



*Exceeding customer expectations
by providing outstanding benefit services
through professional plan administration
and sound investment practices.*



Acquiring Service Credit
Applications Inside

MOSERS.

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This brochure briefly highlights the provisions for acquiring service credit. If there is a discrepancy between the information provided in this brochure and the law or policies which govern MOSERS, the law and policies will prevail. The statutes referenced in this brochure are from the Revised Statutes of Missouri (RSMo).

Forms Included in Brochure

- *Application to Purchase Active-Duty Military Service (104.340.4 & 104.1021.6)*
- *Application to Purchase Other Missouri Public Service (104.344 & 105.691)*

You must be “vested” prior to purchasing service credit. (104.1021.11)

Vesting requirements:

- General employees
5 years
- Legislators
3 biennial assemblies
- Elected officials
4 years (1 term)

Should you (or your beneficiary under a survivor benefit) die before receiving sufficient benefits to cover the cost of the service that you purchased, reimbursement of the amount paid for your service less any retirement or survivor benefits received will be made to a family member or your estate.

The eligibility requirements contained in the different provisions allowing you to acquire prior service credit are very specific. Please refer to the section of this brochure that applies to your type of prior service or contact a MOSERS benefit counselor.

ACQUIRING SERVICE CREDIT

Your retirement benefit is based on a formula that takes into consideration the amount of service credit you have accumulated towards retirement. Members of MOSERS earn a day of service credit for each day of work. That is the most common way of accumulating service credit. However, there are other ways:

- You may have active duty military service.
- You may have worked for some other public entity in the state of Missouri such as a local school district, city, county, or the University of Missouri.
- You may have previous state service that was forfeited or that has not yet been credited.
- You may be eligible to transfer up to eight years of service from one retirement system to another under a special provision in the Missouri State Employees’ Plan (MSEP).
- You may be able to transfer all your service from another public retirement system to MOSERS under a special provision in the Missouri State Employees’ Plan 2000 (MSEP 2000).

This brochure provides examples of these other types of service and explains how you can find out whether or not you can receive credit in MOSERS for your previous service. Generally speaking, you cannot receive credit for the same period of service under two different retirement systems, or receive credit for any period of service for which you already have credit in MOSERS. Some types of service may be added to your records free of charge, others may have to be purchased. It is in your best interest to explore your possibilities, as additional service may increase your benefit and/or enable you to retire sooner.

WHEN TO APPLY

Once you are a vested member of MOSERS, you may acquire eligible prior service credit. The purchase or transfer of service must be completed prior to applying for retirement. It is your responsibility to complete and submit the appropriate form or contact a MOSERS benefit counselor if you wish to receive credit for prior governmental service.

There are three good reasons why you should acquire prior service credit as soon as possible.

- Some of the service credit provisions have deadlines for applying. The laws are very specific. If you miss the deadline, you may not be eligible for the service credit at a later date.
- There is less likely to be a delay in receiving a benefit payment on time if you take the initiative to acquire service long before you apply for retirement. Generally speaking, you have up to two years to pay for purchased service (24 monthly payments). If you elect to transfer service from another retirement plan to MOSERS, it may take up to eight weeks to complete the transaction.
- Waiting may cost you money. Some purchases have an interest component in the calculation. Some purchases are based on the present value of your retirement benefit, which increases as you get closer to retirement.

Likewise, there are two reasons why you may wish to delay purchasing service credit.

- If you are planning to use funds from savings (such as an IRA or your deferred compensation account) to make the purchase, and believe you can earn more on your savings than you will be charged in interest on the service purchase, a financial case can be made for delaying the purchase.
- In the event of a divorce, service purchased during the marriage will be included in calculating the potential ex-spouse benefit.

HOW TO PAY FOR PURCHASES

Submission of the application does **not** obligate you to purchase prior service credit. It simply allows MOSERS to collect the information necessary to give you a cost.

Along with the cost estimate, you will receive an election form. If you decide to purchase your prior service credit, complete the election form and return it to MOSERS. Prior service credit may be purchased using **one or more** of the following payment methods:

- **Lump Sum Payment:** You make a single payment to MOSERS to cover the cost of acquiring the prior service credit.
- **Monthly Payments/Payroll Deductions:** You elect to make monthly payments directly to MOSERS or have the payments deducted from your payroll check. If you elect this payment method, interest will be added to the purchase cost.
- **Rollover From Eligible Employer Plan or Traditional IRA:** You use the funds from an eligible employer plan (including your Missouri Deferred Compensation Plan) or traditional IRA to purchase prior service credit. For more information, please request a Tax-Free Rollovers to MOSERS brochure. For your convenience, the brochure is available on our website (www.mosers.org).
- **Combination of Lump Sum and Monthly Payments:** Please note, if you make a partial lump sum payment up front, we will need to recalculate the amount of your monthly payments based on the remaining balance.

Using After Tax Dollars to Purchase Service

When you retire, you will receive a 1099-R (similar to a W-2) each year for preparing your income tax return. If you purchase service with after tax dollars, the “taxable amount” on the 1099-R will be less than the “gross distribution.” Since you already paid taxes on the money used for the purchase, only a portion of your total benefit during the calendar year will be considered taxable income.

If you use rollover funds to purchase service, the taxable amount will not be reduced.

Before you decide to purchase additional service credit, we recommend you contact a qualified financial advisor to determine how the purchase will affect your overall financial plan.

In the event of a divorce, service acquired during the marriage will be included in calculating the ex-spouse benefit.

You will have 30 days from the date of the quote to make an election to acquire the service credit. If you do not make an election during this period, the cost must be recalculated.

You must complete the purchase or transfer of service prior to applying for retirement benefits.

Short duration active-duty military service such as two-week summer camps in the reserve forces may qualify for service credit.

For more information regarding USERRA guidelines, go to:
www.dol.gov.

Any active-duty military service you wish to purchase must have been performed prior to becoming a member of MOSERS.

Active-duty military service performed after you leave state employment is not eligible for purchase or automatic credit.

You may only acquire active military service that is not being used for credit or benefits under another retirement plan, other than the U.S. military.

ACTIVE-DUTY MILITARY SERVICE

Automatic Credit (104.330 & 104.1021.5)

To qualify for automatic credit of active-duty military service **performed after December 3, 1974**, you must meet the requirements of the Uniformed Services Employment and Reemployment Rights Act (USERRA). Your rights under USERRA are governed by a number of provisions of that federal law.

To be eligible for automatic military service credit, you must:

- Have been employed by the state immediately prior to entering the armed forces.
- Return to state employment within the timeframe specified by USERRA.
- Provide a copy of your military DD214 or NGB 23 honorable discharge form or other pertinent documentation.
- Meet any other requirements under USERRA.

How to Apply

If your active-duty military service qualifies for automatic credit, contact MOSERS to see what action is necessary.

Purchase (104.340.4 & 104.1021.6)

You may purchase **up to four years** of active-duty military service credit **performed prior to becoming a member of MOSERS. This includes active-duty military training.**

To be eligible to purchase military service credit, you must be:

- A vested, actively employed member of MOSERS.
- A terminated-vested member of MSEP (eligible for future benefits, but no longer working for the state).

If you elect to purchase your active-duty military service, you must purchase all that you served (total months and days) up to a maximum of four years. In connection with such a purchase, MOSERS requires that you submit a copy (not the original) of your military DD214 or NGB 23 discharge form, which verifies the following:

- Your service was active duty.
- Your service was in an eligible branch of the U.S. Armed Forces or reserve component (Army, Air Force, Navy, Marine Corps, Coast Guard, Army National Guard, or Air National Guard).
- Your dates of service.
- You were honorably discharged.

How to Apply

For your convenience, an *Application to Purchase Active-Duty Military Service* is located in the back of this brochure. If you would like to purchase your active-duty military service, complete the application, attach the required documentation, and mail it to MOSERS.

EXAMPLE OF MILITARY SERVICE COST CALCULATION**Assumptions**

Months Being Purchased.....	48 months
Election Date	March 15, 2002
Date Employed	January 3, 1985
Time Between Employment & Election	17 years, 2 months, 13 days
Monthly Salary Rate on Date Employed	\$1,250
Contribution Rate on Date of Employment	10.5167%
Interest Rate	8.5%

Principal

Months Purchasing		Salary		Contribution Rate		Principle
48	x	\$1,250	x	.105167	=	\$6,310.02

Interest

.085	x	\$6,310.02	x	17.2055	=	\$9,228.19
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Single Payment Due

\$6,310.02	+	\$9,228.19	=	\$15,538.21
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Monthly Payment Schedule

\$15,538.21	+	\$1,412.99	=	\$16,951.20
\$16,951.20	÷	24	=	\$706.30

Monthly Payment Amount

(April 2002 until March 2004) = \$706.30				
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If you do not have a copy of your DD214 or NGB 23, you may obtain one by contacting the:

**National Personnel
Record Center**

9700 Page Avenue
St. Louis, MO 63132

Phone:
(800) 318-5298 (automated)
(314) 801-0800

Fax: (314) 538-4175
www.vetrecons.archives.gov

If you resided in Missouri when you were discharged from the service, you may obtain a copy of your discharge form by calling the:

Missouri National Guard

Jefferson City, MO

Phone: (573) 638-9683
Fax : (573) 638-9546

Benefit Eligible Position

A position normally requiring the performance by the employee of duties during not less than 1,040 hours per year.

"Benefit Eligible" Position*Summary of Changes to Annual Minimum Hour Requirement*

Date of Service	Minimum Hours per Year
8/28/07 - Present	1,040 hours
10/1/84 - 8/27/07	1,000 hours
Prior to 10/1/84	1,500 hours

If you elect to purchase your prior public employment service credit under 104.344, you must purchase all of that service (months and days) up to a total of four years.

PRIOR PUBLIC EMPLOYMENT IN MISSOURI

Some examples of the types of employment eligible under this category include:

- Public school employment
- City or county local government
- University of Missouri

Service with any not-for-profit organization is considered public employment and is **not** eligible for service credit in MOSERS.

Frequently Asked Question

Q. *I have some prior teacher service that was **not** covered by social security. If I purchase that service for credit in MOSERS, will it be affected by the "windfall elimination" provision?*

A. Generally speaking, the non-social security service that would be eligible for credit in MOSERS is not affected by the windfall elimination provision. However, if the service you are considering purchasing is **not** covered by social security, you should contact a social security office to discuss what implications this purchase would have on your future social security benefit.

There are **four** provisions that address how to receive credit for prior public employment. Please note, the guidelines are very specific.

PROVISION 1**Up to Four Years of Non-Vested Service at Reduced Cost (104.344)**

You may purchase **up to four years** of full-time, nonfederal, Missouri public-sector employment at a reduced rate. To be eligible, you must:

- Be actively employed and vested in a MOSERS covered position.
- Not be vested in another retirement plan for the same service.

How to Apply

For your convenience, an *Application to Purchase Other Missouri Public Service* is located in the back of this brochure. Instructions for completing and submitting the application are located on the form.

EXAMPLE OF SERVICE PURCHASED AT REDUCED COST**Assumptions**

Months Being Purchased.....	48 months
Election Date	March 15, 2002
Date Employed	January 3, 1980
Time Between Employment & Election	22 years 2 months 13 days
Monthly Salary Rate on Date Employed	\$1,250
Contribution Rate on Date of Employment	7%
Interest Rate	8.5%

Principal

Months Purchasing		Salary		Contribution Rate		Principle
48	x	\$1,250	x	.07	=	\$4,200.00

Interest

.085	x	\$4,200.00	x	22.2055	=	\$7,927.36
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Single Payment Due

\$4,200.00	+	\$7,927.36	=	\$12,127.36
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Monthly Payment Schedule

\$12,127.36	+	\$1,105.04	=	\$13,232.40
\$13,232.40	÷	24	=	\$551.35

If you have more than four years of non-vested service, you may purchase any remaining time at full actuarial cost as outlined under Provision 2 (page 8).

Prior public employment service credit may be acquired using one or more of the following statutory provisions:

- 104.344
- 105.691
- 104.800
- 104.1090

Prior public employment service credit may be:

- Purchased (you pay MOSERS for the service credit)
- Transferred (no cost to you; cost transferred from other retirement system)
- Combination purchase and transfer

PROVISION 2

Transfer/Purchase of Service at Full Actuarial Cost (105.691)

In order to use this method, you must be vested in MOSERS. There are transfer and purchase provisions under this method; however, the amount of service that will be transferred is based on the actuarial cost of that service in MOSERS. **In other words, it will not be a day-for-day transfer.**

Transfer

If you are vested in one of the following plans, you can elect the transfer provision.

- **Public School Retirement System (PSRS) or Public Education Employees Retirement System (PEERS)**
PO Box 268 • Jefferson City, MO 65102
(573) 634-5290 • (800) 392-6848
www.psrs-peers.org
- **Local and Government Employees Retirement System (LAGERS)**
PO Box 1665 • Jefferson City, MO 65102
(573) 636-9455 • (800) 447-4334
www.molagers.org
- **Employees Retirement System of the City of St. Louis**
1114 Market Street, Suite 900 • St. Louis, MO 63101
(314) 622-3560
www.stlouis.missouri.org/citygov/personnel

Once your service has been verified, MOSERS will send you an election form that will indicate how much service can be transferred to MOSERS and how much it will cost to purchase any remaining service.

Purchase

If you have additional service remaining after either a transfer or a purchase at reduced cost, you may use this provision to purchase additional credit for that time in MOSERS.

How to Apply

For your convenience, an *Application to Purchase Other Missouri Public Service* is located in the back of this brochure. Instructions for completing and submitting the application are located on the form.

EXAMPLE OF SERVICE PURCHASED AT FULL ACTUARIAL COST

Assumptions

Employee Classification.....	General Employee
Months Being Purchased.....	48 months
Election Date	March 15, 2002
Date Employed	January 3, 1980
Current Annual Salary.....	\$30,000
Interest Rate.....	8.5%

Using the assumptions listed in this example, the full actuarial cost to purchase service under this provision is \$31,601.66.

The purchase price under this provision is based on the amount your benefit is expected to be when you reach retirement age, which includes consideration of your probable future service and your projected salary. The formula uses actuarial assumptions regarding mortality, salary, cost-of-living allowances, and marital status.

PROVISION 3

Eight-Year Transfer Provision in MSEP (104.800)

There is a special provision that will allow you to transfer up to eight years of service to or from any of the following plans:

- Missouri State Employees' Plan (MSEP)
- Administrative Law Judges and Legal Advisors' Plan (ALJLAP)
- Judicial Plan
- Prosecuting Attorneys and Circuit Attorneys' Retirement System (PACARS)

You will forfeit any remaining credit in the plan your service was transferred from. This provision is not available in the MSEP 2000.

How to Apply

To request an application for the eight-year transfer provision, contact a MOSERS benefit counselor at (800) 827-1063.

PROVISION 4

Transfer Provision in MSEP 2000 (104.1090)

If you meet the following criteria, you may be eligible to receive credit for all your previous public employment within Missouri that was covered by another retirement plan:

- You must be an **active** state employee.
- You must have completed **at least 10 years** of service in the MSEP 2000 (or elect the MSEP 2000 at retirement).
- You must be vested in the other Missouri retirement plan.
- There must be a written agreement with the other system to transfer the required funds (benefit value) to MOSERS.

Exception

If you had ten years of service with MU and were age 55, or had five years of service and were age 60 at the time you began state employment, MU will not transfer the service credit.

As of September 2008, we have agreements with:

- **Community Fire Protection District**
9411 Marlowe Avenue • Overland, MO 63114
(314) 428-1128
www.stlouisco.com/fire_districts
- **County Employees' Retirement Fund (CERF)**
2121 Schotthill Woods Dr. • Jefferson City, MO 65101
(573) 632-9203 • Toll Free (877) 632-2373
www.mocerf.org
- **Employees' Retirement System of the City of St. Louis**
1114 Market Street, Suite 900 • St. Louis, MO 63101
(314) 622-3560
www.stlouis.missouri.org/citygov/personnel
- **St. Louis County Retirement Plans**
Administrative Annex, 7th Floor
41 S. Central • Clayton, MO 63105
Phone: (314) 615-5429
www.stlouisco.com/personnel
- **University of Missouri Retirement, Disability, & Death Benefit Plan**
Woodrail Centre • 1000 W. Nifong
Building 7, Suite 210 • Columbia, MO 65211-8220
(573) 882-2146 • (800) 488-5288
www.umsystem.edu/ums/departments/hr/benefits

How to Apply

- **MSEP Members:** If you are eligible to transfer service under this provision, please contact a MOSERS benefit counselor when applying for retirement. You must elect the MSEP 2000 at retirement to qualify.
- **MSEP 2000 Members:** Once you have completed at least ten years of service, contact a MOSERS benefit counselor to request an application.

MODOT AND PATROL EMPLOYEES' RETIREMENT SYSTEM (MPERS) (104.602)

If you have service in MPERS, you may elect to receive credit for that service in MOSERS. This transfer also works in the other direction. In other words, should become a member of MPERS, you could transfer MOSERS service to that system.

How to Apply

Simply notify MOSERS in writing. Include your name, social security number, and your dates of service under MPERS. We will verify your previous service with MPERS. You will receive a letter from MOSERS confirming the transfer when the process is complete. This is a free transfer of service; there is no cost to you.

If you have service in both MOSERS and MPERS and should happen to die before consolidating (transferring) your service, your survivor may elect to receive survivor benefits that are computed as if you elected to transfer service in order to receive the highest possible benefit. If there is no advantage in one system over the other, the benefit will be paid by the system you last accrued service under as a member.

STATE AGENCY SERVICE UNDER THE PUBLIC SCHOOL RETIREMENT SYSTEM (PSRS) (104.372.4)

If you have previous service with a state agency that was credited in PSRS you can elect to transfer that service to MOSERS. Some common examples of this type of service would be employment as an instructor at a regional state college or university, as a teacher in the Department of Corrections, or with the Department of Elementary and Secondary Education. In order to qualify for this transfer of service, you will have had to withdraw any employee contributions you may have made to PSRS.

How to Apply

Simply notify MOSERS in writing. Include your name, social security number, place of employment, and dates of service. We will work with PSRS to verify your previous service. PSRS will send MOSERS the equivalent amount of employer (state) contributions made for this service. You will receive a letter from MOSERS confirming the transfer when the process is complete. Transferring this service involves no cost to you.

LINCOLN UNIVERSITY (104.340.6)

If you were actively employed in a MOSERS covered position on or after June 30, 1988, you may be entitled to creditable prior service for all full-time service rendered at Lincoln University prior to June 30, 1988.

How to Apply

Simply notify MOSERS in writing. Include your name, social security number, and your dates of service. MOSERS will work with Lincoln University to verify your previous service. Once the service has been verified, you will be sent an affidavit to complete. The affidavit states that you forfeit all rights to any benefits accrued under the Lincoln University Retirement System. After we receive your completed affidavit, we will make the transfer and notify you by letter once the process is complete. This is a free transfer of service; there is no cost to you.

CIRCUIT CLERK, DEPUTY CIRCUIT CLERK, DIVISION CLERK (104.345.4)

If you were actively employed in a MOSERS covered position on or after August 28, 2000, you may receive credit in MOSERS for service rendered as a circuit clerk, deputy circuit clerk, or division clerk. The service must have been in a benefit eligible position (at least 1,040 hours per year; 1,500 hours per year prior to October 1, 1984; 1,000 hours per year between October 1, 1984 and August 27, 2007). Also, you **cannot** be vested in a county or city retirement plan for that service.

How to Apply

Simply contact a MOSERS benefit counselor to request a *County Paid Circuit Court Service Application*. Complete and submit the form. MOSERS will work with the Office of the State Courts Administrator to verify your service. You will receive a letter from MOSERS confirming the transfer when the process is complete. This is a free transfer of service; there is no cost to you.

County-Paid Circuit Court Service (104.345.4)

To receive credit for county-paid service, please call MOSERS to complete and submit a *County-Paid Circuit Court Service Application*.

Special Notes

- If your service is vested under LAGERS, you will have **six months from the date of your hire** to transfer your service to MOSERS.
- This provision may include service that was financed in whole or in part by a public or private grant.

Cashed out service is very expensive to buy back.

JUVENILE COURT EMPLOYEE (INCLUDING JUVENILE OFFICERS AND DEPUTY JUVENILE OFFICERS) (211.393)

If you have previous service with a juvenile court, you may be eligible to receive credit for that time in MOSERS.

How to Apply

To request an application for juvenile court employee service, contact a MOSERS benefit counselor at (800) 827-1063. You will receive an election form and verification form. Please follow the instructions on the forms very carefully. MOSERS will work with the Office of the State Courts Administrator to verify your service. You will receive a letter from MOSERS confirming the transfer when the process is complete. This is a free transfer of service; there is no cost to you.

STATE BOARD SERVICE (104.340.2)

If you were formerly a full-time employee of a state board (unassigned or assigned by the governor), you may be eligible to receive creditable service in MOSERS. If you become a member of MOSERS **within one year** of termination of employment with the board, you may receive **up to eight years** of creditable service if you meet both of the following conditions:

- You are not vested in a city or county retirement system.
- You have or attain one or more years of continuous service in a MOSERS covered position.

How to Apply

Simply notify MOSERS in writing. Include your name, social security number, and your dates of service. MOSERS will work with the other board to verify your previous service.

CASHED OUT MOSERS SERVICE (104.335.6)

If you elected to cash out, your MOSERS service was surrendered and no future benefit or potential survivor benefits are payable for that service. The cash out option is intended for members who do **not** plan to return to work for the state. When you left state employment and cashed out, the amount you received was based on the benefit you had earned to date. That can be a relatively small amount, because your benefit stops growing once you are no longer working for the state.

You may elect to purchase this surrendered service **within the first year** of returning to work in a MOSERS covered position. The purchase price is based on the amount your benefit is expected to be when you reach retirement age, which includes consideration of your probable future service and your projected salary. Therefore, the cost of purchasing your surrendered service will be **significantly** more than the lump sum you received.

How to Apply

When MOSERS receives notification that you have returned to work for the state, we will send you an election form and the cost of purchasing your cashed out service.

**Missouri State Employees' Retirement System**

PO Box 209 • Jefferson City, MO 65102-0209

Phone: (573) 632-6100 • Toll Free: (800) 827-1063 • Fax: (573) 632-6188

Email: mosers@mosers.org • Website: www.mosers.org



AMS

APPLICATION TO PURCHASE ACTIVE DUTY MILITARY SERVICE

Please complete and submit this application as the first step toward purchasing your military service (in accordance with the provisions of Section 104.340.4, 287.856.1, 476.524 or 104.1021.6 RSMo). If after being notified of the cost of purchasing your military service credit you elect to do so, you must purchase all active duty military service not to exceed 4 years. Please submit a copy of your DD214 or NGB23 with this application.

SECTION A - PERSONAL INFORMATION

Social Security Number:	Daytime Phone: ()	E-mail Address:
Name: (Last)	(First)	(MI)
Mailing Address: (Street)	(City)	(State) (Zip Code)
PLEASE READ CAREFULLY, SIGN, AND DATE I hereby apply for the purchase of my military service. If I terminated employment prior to 8/13/86, I hereby apply to become a special consultant under Section 104.340.5, RSMo 1997. Except for earning retirement credits in a U.S. military service retirement system, I am not eligible to receive nor am I receiving retirement credits or benefits from any other public or private retirement plan using the period of military service I am applying to purchase from MOSERS.		
Signature of Applicant:		Date:

DO NOT WRITE BELOW THIS LINE**SECTION B - MOSERS USE ONLY**

<input type="checkbox"/> Regular Employee (MSEP)	<input type="checkbox"/> Regular Employee (MSEP 2000)	<input type="checkbox"/> Judge
<input type="checkbox"/> Legislator	<input type="checkbox"/> Elected Official	<input type="checkbox"/> ALJ
Period of Active Duty: (From) (To)		
Prior Months Purchased:	Months Being Purchased:	NOTE: Use this box to override computer calculation if there is more than one period of military service.
Initial Membership Date:		Beginning Monthly Salary:
Benefit Counselor:		Date This Form Was Completed:

**Missouri State Employees' Retirement System**

PO Box 209 • Jefferson City, MO 65102-0209

Phone: (573) 632-6100 • Toll Free: (800) 827-1063 • Fax: (573) 632-6188

Email: mosers@mosers.org • Website: www.mosers.org



TOS

APPLICATION TO PURCHASE OTHER MISSOURI PUBLIC SERVICE (104.344 & 105.691)**INSTRUCTIONS:** To be completed by member wishing to purchase service credit.**SECTION A - MEMBER INFORMATION**

1. Enter your personal information.
2. Enter the name and address of your previous retirement system or employer(s) and the corresponding dates you worked.
3. Sign and date the application.
4. Send the application to the retirement plan you were a member of during the listed dates. If you were not a member of a retirement plan, send the application to your previous employer(s).

Social Security Number:

Daytime Phone:

E-mail Address:

()

Name: (Last)

(First)

(MI)

Mailing Address: (Street)

(City)

(State)

(Zip Code)

1. Was your prior service covered by a retirement plan?



Yes (mail application to previous plan)



No (mail application to previous employer)

2. Was this elected county official service?



Yes



No

3. Was service covered by social security?



Yes



No

Name of Previous Retirement System or Employer
(if service not covered by a retirement plan)Employment Date(s)
Start DateEmployment Date(s)
End Date

Signature of Applicant:

Date:

SECTION B - VERIFICATION OF SERVICE**Instructions:** To be completed by the previous retirement system. If the service was not covered by a retirement system, this section may be completed by the previous employer.**Benefit Eligible** - A position that normally required the performance by the employee of duties during not less than 1,040 hours per calendar year; 1,500 hours per calendar year prior to October 1, 1984; 1,000 hours per calendar year between October 1, 1984 and August 27, 2007.**Retirement System** (complete entire section):

1. Enter the plan's name, address, name of certifying official, title, and phone number.
2. Complete this section using retirement or payroll records to verify the member's creditable service with your plan. If no records exist from which a certification can be made, please indicate this on the application before returning it to MOSERS.
3. Sign and date the application.
4. Mail the application to MOSERS.

SECTION B - VERIFICATION OF SERVICE (CONTINUED)

Previous Employer (complete only sections that apply):

1. Enter employer's name, address, and name of certifying official, title, and phone number.
2. Enter the employee's start date(s) and end date(s) (month/day/year) for all full-time public employment. Please note any period of service when the employee was on leave without pay. If no records exist from which a certification can be made, please indicate this on the application before returning it to MOSERS.
3. Sign and date the application.
4. Mail the application to MOSERS.

I certify that _____ rendered the following credit in this system.

	Period of Service	Period of Service	Period of Service	Period of Service
Service Credit Start Date (M/D/Y)				
Service Credit End Date (M/D/Y)				
Leave-No Pay Start Date (M/D/Y)				
Leave-No Pay End Date (M/D/Y)				
Years/Months of Credit Acquired				
Credit Forfeited	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Credit Vested	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
1. Did the employee work full-time?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
2. Was the person ever vested in a retirement plan?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
3. Is this a contributory plan?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
a. If yes, did the member receive a refund of employee contributions?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
b. If yes, did or will the member receive any lump sum payment or other retirement benefit based on employer contributions?			<input type="checkbox"/> Yes <input type="checkbox"/> No	
4. As of today, what is your actuarial liability for the above service credit?			\$ _____	
Retirement Plan/Employer Name:		Phone Number: ()		E-mail Address:
Mailing Address: (Street)		(City)	(State)	(Zip Code)
Printed Name of Certifying Official:			Title:	
Signature of Certifying Official:			Date:	

If you have any questions regarding the purchase of prior creditable service or how to complete this application, please contact MOSERS at (573) 632-6100 or (800) 827-1063.